JOB DESCRIPTION

Job Title:	Client Relationship Manager – Inspire Financial Services
Location:	Poole
Full / part time:	Full Time
Reporting to:	Inspire Financial Services Operations Manager

Inspire:

Inspire Financial Services Ltd is a part of the Inspire group, which contains Inspire Professional Services, a firm focused on enabling entrepreneurs to succeed. Consisting of talented, passionate and caring professionals committed to supporting our clients. A unique and energetic firm based in Poole, with clients across the South Coast, Inspire Financial Services and Inspire Professional Services represents a truly different place to work.

In joining Inspire Financial Services you would be part of a successful team which continuously meet the support needs of a forward thinking business.

Job Purpose:

You will provide the Relationship Manager service to Inspire Financial Service's clients, in line with the level of support in which they have engaged with us. The main aspect of the role is to provide support to the Financial Advisers and our clients when required. This will enable the delivery of a smooth advice journey for the client from beginning to end. All aspects of the role should be of an excellent standard and delivered within timescales.

Principal Duties and Responsibilities:

You will:

- Be the Relationship Manager for a portfolio of clients and will:
    - Be the key contact between the client, financial advisers and financial services product providers, ensuring excellent relationships are built in line with Inspire's beliefs.
    - Regularly liaise with the clients in your portfolio, seeking to build and maintain proactive and supportive professional relationships.
    - Ensure all new business is processed in a timely and effective manner to ensure the advice journey is as smooth as possible for the client.
    - Ensure client is updated continually throughout the advice journey.
    - Ensure all suitability reports prepared are of an excellent standard and issued within regulatory guidelines.
    - Ensuring the back office system, Intelligent Office is updated daily.
    - All aspects of the advice journey undertaken by Inspire Financial Services must be compliant as regulated by the Financial Conduct Authority.
    - Ensure you keep abreast of changes in regulation from the FCA and the Pensions Regulator.
    - Work effectively to ensure client delight.
    - Ensure deadlines are met, prioritising outstanding work, even when extra hours are required.

  - Be commercially focused and aware of the scope of the work allocated.
  - Keep manager and advisers informed of progress and escalate any potential problems immediately.
  - Liaise with others within Inspire to ensure seamless relationships with clients.

- Have a desire to coach and mentor your colleagues and will:
  - Motivate and encourage members of the team to ensure they are reaching their potential.
  - Ensure trainees understand their responsibilities and receive on-the-job coaching/ training.

- Drive your own development and will:
  - Act in a professional manner, upholding the ethics of Inspire.
  - Lead by example in terms of showing commitment to Inspire and the standards required.
  - Ensure personal and professional development is undertaken.
  - Attend networking events as required.

- Additionally you will:
  - Participate fully in team meetings and contribute to discussions on how to improve processes.
  - Carry out ad-hoc work or project work as required by managers and directors.

Who we are looking for

Inspire Financial Services client relationships are **transparent**, **supportive**, empathetic and **encouraging** while at the same time we are not afraid, while being caring, to be **straight talking** such that we give our clients the right advice, at the right time, to enable them to succeed.

These beliefs (noted in purple) are the guiding principles we follow at Inspire. To succeed at the interview stage and in the role, you will be able to demonstrate your passionate for client service and talk about your experience of providing support and advice to clients which enables them to succeed and which **exceeds expectations**.

You will also have a desire to make a difference within Inspire Financial Services, being team orientated and self-motivated.

In terms of qualifications and experience, you will:

- Be Diploma level 4 qualified, or working towards qualification.

- Have experience working as an administrator, report writer or paraplanner within an adviser office.

- Have a good understanding of Intelligent Office or similar client database system.

- Have experience managing client relationships.